

**GRAY
DAVIS**
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State of California HEALTH AND HUMAN SERVICES AGENCY

Olmstead Work Group

October 11, 2002

Agenda

Agency Departments & Boards: Aging Alcohol and Drug Programs Child Support Services Community Services and Development Developmental Services Emergency Medical Services Authority Employment Development Department Health Services Health and Human Services Data Center Managed Risk Medical Insurance Mental Health Rehabilitation Social Services Statewide Health Planning and Development Workforce Investment	9:30	Registration
	10:00	Introductions & Housekeeping -- Jonathan Clarkson & Karen Neilsen, Facilitators
	10:10	Welcome -- Agnes Lee, Deputy Secretary
	10:15	Overview of Olmstead Decision & Mandate of the Work Group -- Robert Schladales, Assistant Secretary
		Discussion: What Principles Should Guide An Olmstead Plan?
	10:35	California Olmstead Plan: Plan Outline & Process Development -- Agnes Lee, Deputy Secretary
		Workgroup Discussion
	10:55	Organization of Subgroups
	11:00	<i>Break</i>
	11:15	Subgroup meetings: key issues to be Addressed in an Olmstead Plan
	11:50	<i>Break</i>
	12:05	Reconvene Full Work Group for Subgroup Reports
	12:50	Wrap Up/Next Steps – Agnes Lee

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State of California HEALTH AND HUMAN SERVICES AGENCY

OLMSTEAD WORK GROUP

November 22, 2002
Aztec Center
San Diego State University
11:00 AM – 5:00 PM

Agency Departments & Boards:

Aging

Alcohol and
Drug Programs

Child Support
Services

Community Services
and Development

Developmental
Services

Emergency Medical
Services Authority

Employment
Development
Department

Health Services

Health and
Human Services
Data Center

Managed Risk
Medical Insurance

Mental Health

Rehabilitation

Social Services

Statewide Health
Planning and
Development

Workforce
Investment

AGENDA

- **Housekeeping and Approval of Ground Rules – Facilitator (5 min)**
- **Opening Remarks -- Secretary Grantland Johnson (5 min)**
- **Summary of Last Meeting & Agenda Overview -- Agnes Lee (5 min)**
- **Background Information on “Assessment” -- Ellen Goldblatt, Protection & Advocacy, Inc. (30 min)**
- **Identify Subgroups and Tasks -- Facilitator (5 min)**
- **Lunch (1 hour)**
- **Subgroups Meet (1-1/2 hour)**
- **Break (10 min)**
- **Subgroups Report to Large Workgroup – 2:30 PM –Facilitator (50 min)**
- **Discussion – Facilitator (50 min)**
- **Closing/Next Steps- Agnes Lee (5 min)**

**Olmstead Work Group Meeting
San Diego, November 22, 2002**

ASSESSMENT WORKGROUP AGENDA

	Developmental Centers and ICF/DDs (Person-centered plan)	Institutions for Mental Disease (County MH discharge planning)	Nursing Facilities (PASRR)	DMH State Hospitals (Hospital discharge planning)
1. Is the current DDS, Mental Health, or PSARR process for assessing individuals for community living adequate?				
2. Who performs each of the current assessments, and what changes are recommended for this responsibility?				
3. What is included in each assessment, and what changes should be made to enable this tool to become the basis for transitioning a consumer to a community home?				
4. When should each type of assessment first be performed, and what changes in current practice does this suggest?				
5. How frequently should each type of assessment be performed? If the frequency should be allowed to vary, what condition changes would call for a new community placement assessment?				

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State of California HEALTH AND HUMAN SERVICES AGENCY

OLMSTEAD WORK GROUP

December 10, 2002

Student Union

Fresno State University

11:00 AM – 3:00 PM

Agency Departments & Boards:

Aging

Alcohol and
Drug Programs

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and Development

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AGENDA

Transition and Planning

- **Housekeeping and Approval of Ground Rules**
– **Facilitator** (5 min)
- **Opening Remarks**
-- **Secretary Grantland Johnson** (5 min)
- **Summary of Last Meeting & Agenda Overview**
-- **Robert Schladale** (5 min)
- **Identify Subgroups and Tasks -- Facilitator**
(5 min)
- **Subgroup Meetings (30 min)**
- **Lunch (1 hour)**
- **Subgroups Meet (1 hour)**
- **Break (10 min)**
- **Subgroups Report to Large Workgroup –**
2:00 PM – Facilitator (1 hour)
- **Next Steps – Agnes Lee** (5 min)

Send comments to: Olmstead@chhs.ca.gov

**Olmstead Work Group
Fresno, December 10, 2002**

TRANSITION, PLANNING AND DIVERSION

Key Questions to Address:

1. What diversion process needs to be in place to assist individuals and their families to avoid institutionalization?
2. Who should be involved in this process?
3. What information, services and supports are needed to enable these individuals to accomplish a diversion?
4. What transition process needs to be established to enable individuals to move from an institution to a community home?
5. Who should be involved in this process?
6. What information, services and supports are needed to ensure a successful transition?
7. What follow-up activities must be carried out to prevent an individual from being re-institutionalized?
8. Who should be involved in these activities?
9. What resources should be available to the individual and others involved in order to preclude reinstitutionalization?

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State of California HEALTH AND HUMAN SERVICES AGENCY

OLMSTEAD WORK GROUP

January 10, 2003

Junipero Serra State Office Building

320 W. 4th Street, Los Angeles

11:00 AM – 4:00 PM

Agency Departments & Boards:

Aging

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AGENDA

Community Service Capacity

- **Housekeeping and Approval of Ground Rules**
– Kathi Mowers-Moore, Facilitator (5 min)
- **Opening Remarks**
-- Secretary Grantland Johnson (5 min)
- **Summary of the Planning Progress to Date, and
Agenda Overview -- Robert Schladale (5 min)**
- **Panel Discussion: Community Service Capacity
(40 min)**
 - Overview of Olmstead Principles
 - Data Collection, Housing -- Deborah Doctor, PAI
 - Successful Models from Other States
– Margaret Jacobsen, PAI
 - Necessity of Specific Recommendations
-- Deborah Doctor, PAI
- **Identify Subgroups and Tasks -- Facilitator (5 min)**
- **Lunch (1 hour)**
- **Subgroups Meet (2 hours)**
- **Break (10 min)**
- **Subgroups Report to Large Workgroup
/Discussion 3:00 PM – Facilitator (45 min)**
- **Next Steps – Agnes Lee (5 min)**

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Olmstead Work Group Meeting Los Angeles, January 10, 2003

Breakout Group 1 – TRANSPORTATION AND HOUSING*

1. What are the information and referral problems for transportation and housing?
2. What information and referral recommendations should be made?
3. What problems exist regarding the available types and modes of service? For transportation? For housing?
4. What recommendations should be made for types and modes of service?
5. What are the eligibility problems?
6. What eligibility recommendations are needed?
7. What are the problems with the current quantity of transportation services? Housing services?
8. What recommendations are needed regarding the quantity of services?
9. What are the major transportation funding problems? Housing funding problems?
10. Transportation funding recommendations? Housing funding recommendations?

Breakout Group 2 – COMMUNITY LIVING ARRANGEMENTS AND IN-HOME SUPPORTS*

1. What are the information and referral problems for community living and in-home supports?
2. What information and referral recommendations should be made?
3. What problems exist regarding the available types and modes of service? For community living? For in-home supports?
4. What recommendations should be made for types and modes of service?
5. What are the eligibility problems?
6. What eligibility recommendations are needed?
7. What are the problems with the current quantity of community living services? In-home support services?
8. What recommendations are needed regarding the quantity of services?
9. What are the major community living funding problems? In-home support funding problems?
10. Community living funding recommendations? In-home support funding recommendations?

Breakout Group 3 – DAY ACTIVITIES, EDUCATION, EMPLOYMENT, LEISURE*

1. What are the information and referral problems?
2. What information and referral recommendations should be made?
3. What problems exist regarding the available types and modes of service?
4. What recommendations should be made for types and modes of service?
5. What are the eligibility problems?
6. What eligibility recommendations are needed?
7. What are the problems with the current quantity of services?
8. What recommendations are needed regarding the quantity of services?
9. What are the major funding problems with regard to day activities, education, employment, leisure, etc.?
10. What are the funding recommendations?

Breakout Group 4 – CRISIS SERVICES, SERVICES COORDINATION AND ADVOCACY*

1. What are the information and referral problems for crisis, coordination and advocacy services?
2. What information and referral recommendations should be made?
3. What problems exist regarding the available types and modes of crisis, coordination and advocacy services?
4. What recommendations should be made for types and modes of service?
5. What are the eligibility problems?
6. What eligibility recommendations are needed?
7. What are the problems with the current quantity of crisis, coordination and advocacy services?
8. What recommendations are needed regarding the quantity of services?
9. What are the major crisis, coordination and advocacy service funding problems?
10. Crisis, coordination and advocacy service funding recommendations?

Breakout Group 5 – MEDICAL SERVICES AND ASSISTIVE TECHNOLOGY

1. What are the information and referral problems related to medical services and assistive technology?
2. What information and referral recommendations should be made?
3. What problems exist regarding the available types and modes of medical services and assistive technology?
4. What recommendations should be made for types and modes of service?
5. What are the eligibility problems?
6. What eligibility recommendations are needed?
7. What are the problems with the current quantity of medical services? Assistive technology?
8. What recommendations are needed regarding the quantity of services?
9. What are the major medical service funding problems? Assistive technology funding problems?
10. Medical service funding recommendations? Assistive technology funding recommendations?

Telephone Breakout Group - TOPICS WILL BE CHOSEN BY PHONE GROUP IMMEDIATELY PRIOR TO DISCUSSION

1. What are the information and referral problems?
2. What information and referral recommendations should be made?
3. What problems exist regarding the available types and modes of service?
4. What recommendations should be made for types and modes of service?
5. What are the eligibility problems?
6. What eligibility recommendations are needed?
7. What are the problems with the current quantity of services?
8. What recommendations are needed regarding the quantity of services?
9. What are the major funding problems?
10. What are the funding recommendations?

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State of California HEALTH AND HUMAN SERVICES AGENCY

OLMSTEAD WORK GROUP

January 21, 2003
Elihu Harris State Office Building
1515 Clay Street, Oakland
11:00 AM – 4:00 PM

Agency Departments & Boards:

Aging

Alcohol and
Drug Programs

Child Support
Services

Community Services
and Development

Developmental
Services

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AGENDA

Quality Assurance and Other Issues

- **Housekeeping and Approval of Ground Rules**
– Kathi Mowers-Moore, Facilitator (5 min)
- **Opening Remarks**
-- Secretary Grantland Johnson (5 min)
- **Summary of the Planning Progress to Date, and
Agenda Overview -- Robert Schladale (5 min)**
- **Panel Discussion: Quality Assurance (30 - 40 min)**
(Participants and duration to be discussed)
- **Identify Subgroups and Tasks -- Facilitator (5 min)**
- **Lunch (1 hour)**
- **Subgroups Meet (1 1/2 hours)**
- **Break (10 min)**
- **Subgroups Report to Large Workgroup
/Discussion 3:00 PM – Facilitator (50 min)**
- **Next Steps – Agnes Lee (30 min)**

Send comments to: Olmstead@chhs.ca.gov

Olmstead Work Group Meeting Oakland, January 21, 2003

Quality Assurance Plus – Key Questions

Question 1. What processes will be put in place to ensure continuous quality improvement? (See matrix)

Elements Requiring QA/Monitoring:	What are appropriate quality assurance goals?	What policies and directives should be in place to ensure quality?	To whom are providers accountable: State? Consumer/ consumer rep? Funding source?	What info should be collected? How and how often should it be collected?	How will this information be used to improve quality?
Assessment Process					
Transition and Diversion					
Community Capacity (Categories: Transportation, Housing, In-Home Services, Day Services, Care Coord, Medical Services)					

Question 2. What important issues have not been discussed at the Work Group meetings? What recommendations are appropriate for these issues?

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State of California HEALTH AND HUMAN SERVICES AGENCY

OLMSTEAD WORK GROUP

February 13, 2003

Health and Human Services Data Center Training Facility
9323 Tech Center Drive, Sacramento
11:00 AM – 4:00 PM

Agency Departments & Boards:

Aging

Alcohol and
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AGENDA

Review of Draft Olmstead Plan Outline

- **Housekeeping and Approval of Ground Rules**
– Kathi Mowers-Moore, Facilitator (10 min)
- **Opening Remarks**
-- Secretary Grantland Johnson (5 min)
- **Overview of the Plan -- Robert Schladale** (35 min)
- **Identify Subgroups and Tasks -- Facilitator** (10 min)
- **Lunch** (1 hour)
- **Subgroups Meet** (1 hour 45 min)
Facilitators will take comments on the draft plan.
- **Break** (15 min)
- **Subgroups Report to Large Workgroup**
3:00 PM – Facilitator (50 min)
- **Next steps – Agnes Lee** (10 min)

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State of California HEALTH AND HUMAN SERVICES AGENCY

OLMSTEAD WORK GROUP

February 28, 2003

Health and Human Services Data Center Training Facility

9323 Tech Center Drive, Sacramento

11:00 AM – 3:30 PM

Agency
Departments &
Boards:

Aging

Alcohol and
Drug Programs

Child Support
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AGENDA

Review of Revised Olmstead Plan

- Recommended Future Actions -

- **Housekeeping and Approval of Ground Rules**
– Kathi Mowers-Moore, Facilitator (10 min)
- **Opening Remarks**
-- Secretary Grantland Johnson (5 min)
- **Summary of Planning Process and**
Activities for Today -- Robert Schladale (5 min)
- **Identify Subgroups and Tasks -- Facilitator (10 min)**
- **Subgroups Meet (11:30 – 12:30)**
State staff will discuss and take comments
on the draft plan.
- **Lunch (30 minutes)**
- **Subgroups Meet (1:00 – 2:45)**
- **Break (15 min)**
- **Subgroups Reconvene in Large Workgroup: 3:00 PM**
- **Next steps – Agnes Lee (10 min)**

Send comments to: Olmstead@chhs.ca.gov